

# **HEADQUARTERS POLICY FLASH**

**POLICY FLASH 2003-30**

DATE: November 25, 2003  
TO: Procurement Directors  
FROM: Office of Procurement and Assistance Policy, ME-61  
Office of Procurement and Assistance Management

SUBJECT: Availability of Financial Assistance Announcement Template and Tips for Navigating the Document

SUMMARY: This Policy Flash provides tips on using the new DOE-wide financial assistance announcement template.



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Financial Assistance Letter 2003-03R introduced a new announcement format for all discretionary competitive financial assistance funding opportunities. The new format is based on a policy letter issued by the Office of Management and Budget and provides a standardized format for all federal grant making agencies. A template has been developed for use by DOE personnel to simplify the creation of the announcement.

A WORD® version of the new DOE-wide announcement template is currently available at [http://professionals.pr.doc.gov/ma5/MA-5Web.nsf/WebAttachments/FinancialAssistanceTemplate/\\$File/FinancialAssistanceTemplate.doc](http://professionals.pr.doc.gov/ma5/MA-5Web.nsf/WebAttachments/FinancialAssistanceTemplate/$File/FinancialAssistanceTemplate.doc) (See FAL 2003-03R for guidance on its use). The WORD® document is partially protected to ensure standardized formatting. Each section generally includes choices of standardized text and a blank text block. Contracting Officers/Program Officials may select the appropriate standardized text or complete the text block to provide specific information for the announcement or more accurately define the terms of the competition.

The template can be navigated using these quick tips:

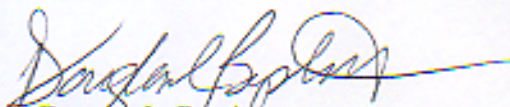
- Use the template, not a previously completed announcement, by saving the template from the web page. (The current version is dated 11/14/2003.) After saving the template, open it in WORD®; when prompted, select read-only and then enable macros. Each time the announcement is saved, a new file name is required. A sequential system of 1-2-3 or a-b-c is recommended.
- Directions for completing each section of the template can be accessed by enabling the hidden text. In WORD® 2002, hidden text is enabled on the Tools menu under Options, View, Formatting Marks.
- Help is generally available by pressing <F1> when in a text block.
- The <Tab> key will jump between fill-in blocks and check blocks. In the tables and unprotected sections, such as Section IV.2.D-Application, pressing the <Tab> key will not move the cursor to the next block; instead a normal tab will be inserted.
- Fill-in boxes are grayed out; click in the box to insert text.
- Some fill-in boxes have drop down menus which will activate by clicking in or tabbing to the box. For example, drop down menus are available to choose between DOE and NNSA.
- Clicking in the boxes in front of each block of standardized text will select that paragraph(s). A second click will unselect the box.
- When entering dollars in Section II Award Information, there is no need to enter zeroes or dollar signs as the block will format the numbers.



- Be careful when entering the percentage cost share in Section III.2, the block formats to the percent from a decimal, e.g., if you enter 20 you get 2000%.
- The fill-in boxes for dates will format whatever is entered, including numbers. The formatting default is MONTH ##, ####, with a default to the first day of the month if no date is entered and if no year is entered, the date becomes the year and a 1 is used for the date. Note: all date text blocks are designed with automatic formatting except for Section V.3-Anticipated Announcement and Award Dates, which is a plain text box to allow for month/year dates only.
- Holding the <CTRL> key plus clicking on the blue underlined links, such as URLs or section numbers moves the cursor to the referenced section or web page. This will also allow you to jump from the Table of Contents to the applicable section.
- Boxes that have been checked denote required information and you must complete the fill-in information, if applicable.
- The text in Section IV.2.D Application is unprotected. All text not applicable to the announcement may be deleted.

A new forms web page was created to provide potential applicants with one location to find the forms, or links to the forms, needed to respond to a financial assistance opportunity announcement. The web page can be accessed directly at <http://professionals.pr.doe.gov/ma5/ma-5web.nsf/FinancialAssistance/IPSFAForms?OpenDocument>, through a link on the Financial Assistance Opportunity page or through the Information page on the DOE E-center.

If you have technical questions on the template or on the forms page, please contact Mara Grissom at 202-586-9729 or by e-mail at [mara.grissom@hq.doe.gov](mailto:mara.grissom@hq.doe.gov). Questions on template content or on FAL 2003-03R should be directed to Jackie Kniskern at 202-586-8189 or by e-mail at [Jacqueline.kniskern@hq.doe.gov](mailto:Jacqueline.kniskern@hq.doe.gov) or Trudy Wood at 202-586-5625 or by e-mail at [trudy.wood@hq.doe.gov](mailto:trudy.wood@hq.doe.gov).



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